Milwaukee County

Milwaukee County

Enterprise Platform Modernization Project

Communication Plan

August, 2016

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1.0 INTRODUCTION

The purpose of the Milwaukee County (County) Enterprise Platform (ERP) Modernization Project Communication Plan is to provide an overall framework for enabling successful communications to the various project stakeholders and impacted County employees. The Communication Plan employs processes that ensure timely and appropriate generation, collection, distribution, receipt, and ultimate disposition, of project information. The communication processes provide the critical links among people and information that are necessary for project success.

The plan also ensures that the appropriate information about the project is communicated to the right audience at the right time. Doing so effectively helps reduce overall project risk and contributes to greater buy-in and user acceptance in the end.

This plan addresses the types of communication that the ERP project will deploy, the individual responsible for communicating the information, the person or groups who will receive the information, communication format (e.g. written/oral), information about how the communication will be distributed (e.g. email, in-person, presentation), and the frequency of the communication. It also contains the names of the project stakeholders and their role(s) that have been identified to-date. Finally, this Communication Plan contains a RACI matrix which explains who is Responsible, who is Accountable, who will be Consulted, and who will be Informed for each type of communication outlined in the plan.

The purpose of this plan therefore is to define the overall project communication process. It may be supplemented where needed by project or process specific action plans such as those deployed by external consultants, other legal entities, or a County specific event. These action plans are likely to be much more specific to the timing, audience, and content of the specific communication and are therefore not included within this document. They are optional based upon the needs of the project.

2.0 COMMUNICATION PROCESSES

Several processes have been identified below that compose the overall Communication Plan objectives:

- ➢ **Planning** – determining the basic information and communications needs of the stakeholders

- ➢ **Information Distribution** – making that needed information available in a timely manner and in an appropriate format, as well as responding to requests for information

- ➢ **Performance Reporting** – collecting and distributing performance information such as status reports, forecasts, delays, etc.

➢ **Stakeholder Management** – managing communications to satisfy the requirements of stakeholders along the way.

This plan addresses each of those four processes as described below. Where the data needed for specific processes is intended to be documented outside of this particular communication plan, it is thereby noted.

3.0   PLANNING

As part of the communications planning process, it is important to know who the stakeholders are and their communication requirements. The chart below represents County and third party groups of stakeholders and their high level communication objectives.

Stakeholder	Role/Need
County Management / Leadership	Monitor and respond to project status, risks, and issues
County Project Manager	Information gathering, summarizing, and reporting all project status to the County management team
Plante Moran Project Manager	Information gathering, summarizing, and reporting all project status to the County project team
Organizational Change Management (OCM)Lead	Execute the Communication Plan during the Implementation Phase of the project.
Project Team Members	Identification of task status, issue escalation, and departmental communication
County Employees	Receive project updates via appropriate channels at specific points along the project and provide feedback (concerns, questions, etc.) as needed

Throughout the implementation project, the OCM Lead executes communication sharing via the stakeholder planning guide above. The OCM Lead also reports any communication issues to the project manager for resolution or escalation. It is the responsibility of the OCM Lead to monitor compliance with the plan and correct gaps if they are uncovered along the way.

Prior to the implementation phase, the County PM, Sponsor, and Plante Moran PM will perform the duties assigned to the OCM as best fits the communication message. For example, the Plante Moran PM will communicate status of vendor responses; the Sponsor will communicate status to the Board; and the County PM will communicate project status related to tasks, issues, and risks to various stakeholders as deemed by the message.

4.0   INFORMATION DISTRIBUTION

Information distribution is concerned with making information available to project and non-project stakeholders in both a pre-planned manner as well as being ready for as-needed requests for information. The communications matrix below documents the types of communications (e.g. status reports, meetings), how they will be delivered (e.g. email, phone, face-to-face), frequency of delivery, responsibility assignments, and purpose of the communication.

Audience	Purpose	Vehicle	Subject	Content Provider	Approver	Frequency
Executive Steering Committee	Status and issue escalation	Meeting with agenda	Management dashboard status, approval, recommendations, issues	Plante Moran Project Manager / County Project Manager(PM)	Sponsor	Bi-weekly
Board	Status and impacts	Briefing	Project status / change requests	Sponsor	Board	As-needed
Project Team	Deliver and receive status	Team meetings and SharePoint folders	Project task status, issues, and risks	Team members	NA	Weekly
Department Managers	Status	Team Leads: one-on-one or email	Project status - activities that impact their areas – people and process	County PM, Team Leads, OCM Lead	NA	Monthly
General end users	Status and feedback	County intranet, blog, emails	Status and impacts to their jobs	County PM, Sponsor, Executive Steering Committee, OCM Lead	Executive Steering Committee	As needed
Outside vendors	Impact to current state processes	Email, letters, one-on-one	How the new system may result in different relationships or different processes	Sponsor, Department Heads, County PM, Plante Moran PM	Executive Steering Committee	As needed
General public	Impact to current state	Intranet, mailings	How the new system will impact their current way of communicating / working with the County	OCM Lead	Sponsor	As needed

5.0   STAKEHOLDER MANAGEMENT

Stakeholder management refers to managing communications to satisfy the needs of, and resolve issues with, project stakeholders. Actively managing stakeholders increases the likelihood that issues will be more quickly identified and addressed, reducing risk of project delays, stakeholder dissatisfaction, and public disapproval. Within the project's Organizational Change Management plan, specific communication sub-plans/action plans are built-in that address stakeholder communications. However, within the overall project communication plan, a high level description of stakeholder management is included below. The three components of stakeholder management included are 1) Stakeholder Analysis, 2) Communication Approach, and 3) RACI Assignments

Stakeholder Analysis

The chart at the end of this section represents a Stakeholder Network Analysis diagram which is intended to reveal the communication links between the various stakeholders on the project. It is useful in identifying communication gaps and in guiding the distribution of project information. Once it is developed, the communication process needs to be executed to address every relationship in the diagram throughout the project. In developing and executing the networking relationships, the following activities need to be performed.

- ➢ **Stakeholder Identification** - Identifies people, groups, or organizations that could impact or be impacted by a decision, activity, or outcome of the project. The OCM Lead analyzes and documents the constituents' interests in, and influence on, the project.

- ➢ **Stakeholder Management** – Executes communication processes to successfully manage stakeholder expectations.

- ➢ **Stakeholder Engagement** - Communicates and works with stakeholders to meet their needs/expectations, address issues as they occur, and supports stakeholder engagement.

- ➢ **Stakeholder Communications Controls** - Monitors overall project stakeholder relationships, adjusts strategies and plans for engaging stakeholders, and executes communication approaches to address identified issues.

Stakeholder management is owned and executed by the project OCM Lead with input from the County project management team. The OCM Lead takes a proactive role in 'listening' for stakeholder feedback and addressing issues both on an immediate basis and through long range monitoring. The OCM Lead is responsible for reporting status of project communications to the project management team and the Executive Steering Committee.

Stakeholder Network Analysis Diagram

Below is a communication flow diagram (not an organization chart) that represents the multiple communication channels on the project. The highlighted OCM Lead box represents the 'owner' of the communication monitoring and execution process.

* Responsible for communicating to their teams
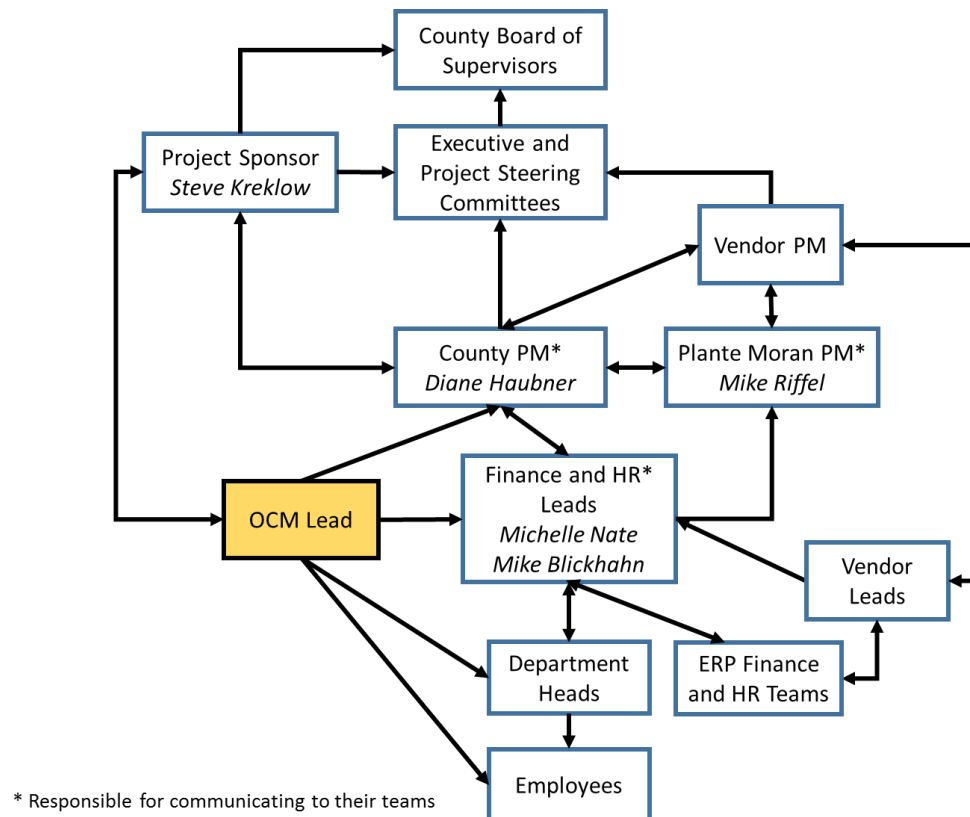
Communication Approach

Communication is a two-way street. While it is required that the project team communicate all relevant information to stakeholders on project outcomes, it is critical that they also provide and monitor feedback loops from stakeholders. Constantly being told what is going on without having the ability to respond back, can create self-defensiveness in the user community. The goal of the ERP project is to deploy a continual two-way communication strategy to be executed by the OCM Lead, the project sponsor, the project management team, and the functional leads throughout the project.

Managing Resistance

While communication is key to a project's success, it involves both dialogue as well as recognition of resistance to change. The goal of good project communication is to create positive change in the user community. Below, a high level approach has been documented

that is based on proactive recognition of resistance and planned exploration and solution development to manage that resistance.

To better break down (and communicate!) the process for enabling a successful 'two way street', a three-prong approach has been identified. This approach addresses both outward and feedback communication channels. The three prong approach is grouped into project start activities, problem exploration, and solution development. The County has already identified owners of several of these communication objectives.

Project Start

Project Launch (Executive Steering Committee)

- Define clear aim
- No to status quo
- Assign a project champion

Project Champion (Steven Kreklow)

- Committed to success
- Has power, prestige, and staff respect
- Understands impact of changes on staff

Linkage and Communication – Senior Leadership (Executive Steering Committee)

- Endorse solution
- Allocate time and resources to remove barriers
- Believe project will advance strategic goals
- Be informed and be involved

Problem Exploration

Financial and Human Resource Leadership (Michelle Nate, Mike Blickhahn)

- Assigned champions ensure project meets goals
- Endorse solution publically
- Provide time and resources to project
- Involve and inform departmental leadership

Staff (Module Leads)

- Project Leads ensure that user goals are met
- Allocate time and resources

Tension for Change (OCM Lead)

- Identify informal staff opinion leaders
- Identify disagreement with current process
- Identify ways to create positive change

Solution Development

Deployment (Project Team)

- Respected experts support change
- Evidence is provided that change works

Flexibility (Change Champions Network and OCM Lead)

- Adapt to current situation without impacting effectiveness
- Ensure that process and communications is politically easy to implement
- Communicate repeatedly
- Deploy, monitor, and respond to feedback loops

RACI Assignments

As projects get more involved as they progress, communication and accountability for assignments becomes more important. A tool to assist with describing those responsibilities and identifying all impacted parties related to information sharing and decision making, is a RACI diagram. RACI is the acronym that describes the following:

- ➢ R = Responsible (the person who performs the action/task)
- ➢ A = Accountable (the person who is held accountable that the task is completed properly)
- ➢ C= Consulted (the person/s who is consulted before performing the action/task)
- ➢ I = Informed (the person/s who is informed after performing the action/task)

A RACI diagram has been developed for the ERP project as follows:

Communication Message	Project Sponsor	Executive Steering Committee	Board	Functional Leads	Module Leads	SME's	IMSD	Plante Moran PM	County PM	OCM Lead	Plante Moran Project Team	County End Users	Third Party Vendors
1 Identify issues and risks	I	I		R	R		R	R	A	R	I		
2 Report project status		I	I	R	C	C	R	A	C	I	C		
3 Identify communication content	C			I			I	C	C	A			
4 Communicate to Board	A												
5 Communicate to end users										A		I	
6 Own vendor communication relationships							R	A	R				
7 Manage user expectations				R	R			R	R	A		I	
8 Endorse ERP solution	A	I	I	R									
9 Manage vendor communications	R			I	I		I	A	R	I	I		R

6.0   PERFORMANCE REPORTING

Performance reporting involves the dissemination of project status information as it impacts scope, schedule, cost, and quality. The project status reporting process includes the development of regular and exception-based status reports using multiple communication techniques. These techniques include the following:

- ➢ Status reports
- ➢ Meetings – project / department teams
- ➢ Meetings – one-on-one
- ➢ Conference calls
- ➢ Video conferencing
- ➢ Off-site presentations
- ➢ Emailing documents / notes / messages
- ➢ Storing documents (SharePoint)
- ➢ Newsletters
- ➢ Intranet site postings (internal)
- ➢ Internet site postings (public)

Reporting can take on different forms and content based on the audience. While project team Subject Matter Experts may need very specific information on the project (e.g. the detailed testing script timeline), other audiences such as executives and the user community are better communicated with at a high level. For the ERP project, communication content is expected to be executed as follows:

Weekly Project Team Reporting
- ➢ Detailed status reporting
- ➢ Follow-up items
- ➢ Project schedule updates
- ➢ Task status communication
- ➢ Issue and risk identification and mitigation
- ➢ Next steps

Executive Management
- ➢ Milestone dashboards
- ➢ Completed activities
- ➢ Issues and risks
- ➢ Cost / schedule impact reporting
- ➢ Next steps

End User Community Reporting
- ➢ High level status of project activities / timeline
- ➢ Impact to their day-to-day jobs
- ➢ Personal involvement (e.g. participating in training)

In addition to status reporting, a project team SharePoint repository of project documentation is maintained. The OCM Lead is also responsible for creating Milwaukee Country internet communication postings as appropriate.

APPENDIX

Revision History

Change Date	Changed by	Description of Change	Version
08-09-16	Diane Haubner	Initial version	1.1
08-10-16	Diane Haubner	Applied changes made by Mike Riffel	1.2
08-11-16	Diane Haubner	Made grammatical and formatting changes	1.3

Validation History

ID	Stakeholder Name	Specific Role or Area of Expertise
Supplier 1	Mike Riffel	Plante Moran Project Manager
Supplier 2		
Supplier 3		
Reviewer 1	Steve Kreklow	Project Sponsor
Reviewer 2	Michelle Nate	Financials Functional Lead
Reviewer 3	Mike Blickhahn	Human Resources Functional Lead